

# 1. INTRODUCTION

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## 1.1 OVERVIEW

The region and environment in which Washington State Ferries operates has changed substantially since 1999 when the last travel survey was undertaken. A slower economy, localized employment reductions and higher fares have all contributed to a dampening in ferry travel demand. At the same time, the elimination of the Washington's Motor Vehicle Excise Tax and the failure of Referendum 51 have made State funding increasingly scarce, requiring Washington State Ferries (WSF) to become more self sufficient. Following a change in senior management, WSF has charted a revised course under a new Business Plan that counts among its goals generating more revenue at a lower cost.

Recent tariff policies have contributed toward the goal of increased revenues. Since 1999, a series of tariff revisions and fare increases have raised the average fare paid by over 40 percent, with the effective increase in the frequent-user discounted fare on the Seattle-Vashon passenger-only route totaling 128 percent. While these steps have generated much needed additional revenue toward the goal of covering 80 percent of operating costs, they have also contributed to slower overall demand growth, and even declining demand on some routes.

WSF is also developing a new Long Range Strategic Plan as a component of the 2005 update to the Washington Transportation Plan. A clear understanding of how WSF customers' travel patterns are changing, in combination with demand forecasts and funding constraints, are needed to evaluate the service levels and route structures best suited to accommodate future travel. This Strategic Plan will address critical capital investment decisions such as vessel replacements and major terminal investments, including those at Colman Dock and Fauntleroy. One such example is exploring the possibility of auto ferry service between Vashon and Southworth into Colman Dock (Pier 52) in downtown Seattle.

These changes and others all put forward the need to collect new information about WSF customers' travel patterns. The WSF 2003 South Sound Survey was undertaken to provide this updated information, by generally replicating the procedures and questionnaire of the 1999 system-wide survey, targeted to five South Puget Sound routes. Like the 1999 effort, the 2003 survey was conducted over the second half of a weekday, with specific emphasis placed on travel within the peak period between 3 and 7 PM.

Two main objectives of the 2003 survey include:

- To examine how ferry user travel patterns have changed since 1999; and
- To provide data to evaluate the impacts and practicality of potential route and service changes such as the possible relocation of existing ferry service from the Fauntleroy terminal to Colman Dock (Pier 52) in downtown Seattle.

## 1.2 REPORT ORGANIZATION

The report is organized around four main sections following this introduction:

- Chapter 2 – Survey Methods and Results Application;
- Chapter 3 – South Sound Survey Key Findings; and
- Chapter 4-8 – Individual Route Analyses and Survey Results.

Chapter 2 presents a summary of the survey approach, methodology, and results applications to familiarize the interested reader about the survey process, including sample design, survey periods, administration and data analysis. Summary response statistics are provided and survey precision levels based upon question type and data subset are reported. Chapter 2 also touches on the geographic information system (GIS) elements of this survey, including the geocoding of various address information to facilitate mapping of travel patterns.

Many readers will want to go directly to Chapter 3, which identifies the market area for the South Sound Survey and provides key findings, including how travel patterns have changed since the 1999 survey, and how this information may inform the evaluation of a potential terminal relocation option.

The remaining chapters present key survey tabulations and analyses presented individually for each of the five South Sound routes. Ferry riders traveling between downtown Seattle and the South Kitsap Peninsula using both the Southworth-Vashon and Seattle-Vashon passenger-only routes via a transfer at Vashon Island have been placed into a virtual "Seattle-Southworth" route. These results are presented separately within the Seattle-Vashon passenger-only chapter.

Each route chapter includes a range of tabulated results from general ferry rider trip characteristics to detailed travel patterns regarding access, boarding and egress modes by direction. Of particular interest are the ferry user origin-destination trip tables and accompanying maps which collectively show the locations and patterns served by each route.

## 1.3 EXCLUDED FROM THIS REPORT

The WSF 2003 South Sound Survey collected weekday afternoon and evening travel information from over 1,800 ferry riders in October 2003. With the exception of data on desired transit improvements, this survey collected all of the rider trip making and demographic information that was previously gathered in the WSF 1999 Travel Survey. However, as was the case in 1999, not all possible information and survey data tabulations are reported. Rather, this report focuses on travel pattern information relevant to current WSF planning activities. Nonetheless, all of the survey information collected is preserved in the survey database to support any further analysis and research activities.

Readers familiar with the 1999 survey report will note many similarities and a few key differences. Among the differences is the fact that a Sunday survey was not conducted in

this most recent survey effort. Similarly, since only a subset of the WSF system was surveyed, there is no chapter providing system-level tabulations and analysis of ferry rider demographics and trip-making characteristics, though Chapter 3 does examine the market area served by the South Sound routes.

Also, the grouping of routes into corridor markets for analysis was not undertaken, and within each route chapter, information about respondent parking patterns, wait times, and round-trip information is not reported, though this information was collected.

Finally, this report does not provide any information about morning travel patterns beyond what can be inferred from PM peak period data. However, WSF has augmented this afternoon/evening survey effort by conducting a complementary morning survey on May 18, 2004 of the two routes serving the Fauntleroy terminal.